PayForIt.net™

User Manual

Date Last Updated: December 23, 2008 (TEL)
Date Last Printed: April 22, 2010

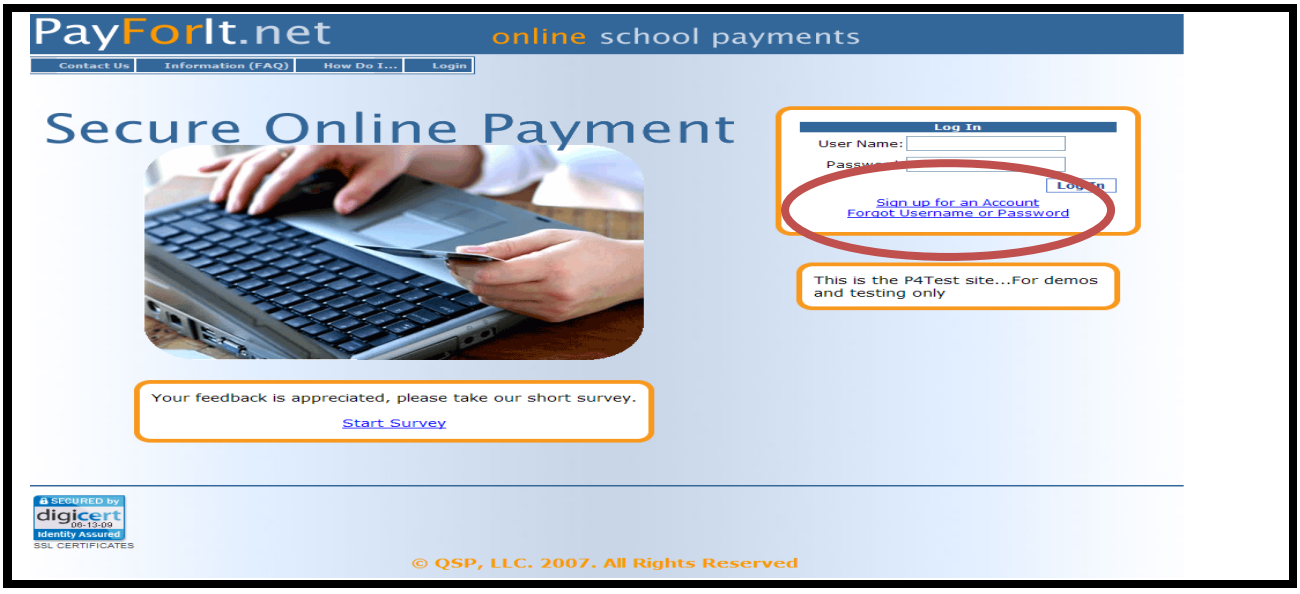
Chapter 1: Overview of PFI

PayForIt.net is an online web prepayment system that gives you flexibility in managing your child's cafeteria meal account at school. As a parent you can perform the following functions:

- Add money to your child's meal account 24/7
- Check your child's account balance 24/7
- Request an activity report so you can see what your child has purchased
- Set up recurring payments so money will automatically be deposited once your child's balance falls below a certain amount
- Set up email alerts so you know when your child's balance reaches a certain amount

Chapter 2: Sign up for an Account

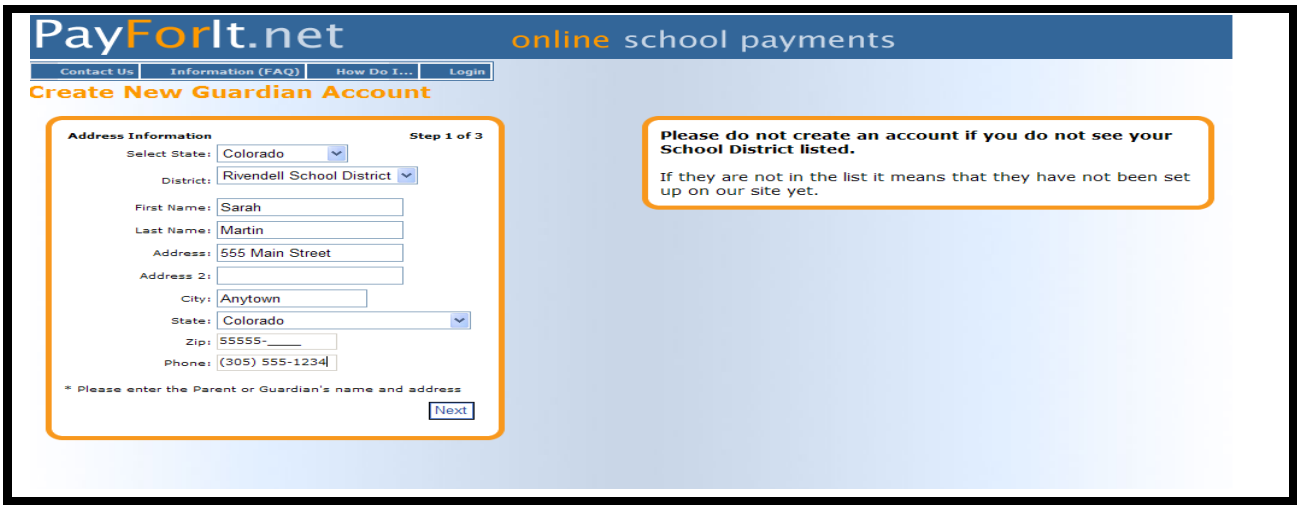
To sign up for an account, the parent must log into the internet and go to the following website: https://www.payforit.net and click on the link to "Sign up for an account."



There are three steps to the registration process: Create New Guardian, enter Credit Card Information, and set up user information. The following will explain each step in detail. All screenshots and explanations of fields will be shown first. Instructions for actually creating an account will be shown after the explanations of fields.

Select "Sign up for an Account" from the PFI Website.

A screen similar to the following will appear:


PayForIt.net
online school payments
Contact Us
Information (FAQ)
How Do I...
Login
Create New Guardian Account
Address Information
Step 1 of 3
Select State: Colorado
District: Rivendell School District
First Name: Sarah
Last Name: Martin
Address: 555 Main Street
Address 2:
City: Anytown
State: Colorado
Zip: 55555-____
Phone: (305) 555-1234
* Please enter the Parent or Guardian's name and address
Next
Please do not create an account if you do not see your School District listed.
If they are not in the list it means that they have not been set up on our site yet.

Select State

This field contains a list of states that are currently using PFI.

District

This field contains a list of all districts in the selected state that are currently using PFI.

First Name/Last Name

These fields contain the first and last name of the user signing up for the account.

Address/Address 2/City/State/Zip

These fields contain the address, city, state, and zip of the user signing up for the account.

Phone

This field contains the phone number of the user signing up for the account.

Create New Guardian Account
Credit Card Information
Step 2 of 3
Type: Visa
Credit Card # (no dashes): 4111111111111111
Nickname for Card: Mom's VISA
Expiration Date: December / 2008
Nickname: Your Credit Card number is not displayed on the site, so the Credit Card Nickname is used to identify your credit card on the Payment screen.
Examples: My Visa, Points MC, United Miles
Previous
Next

Type

This field contains a list of different types of credit cards. For example, Master Card, Visa Card, or American Express.

Credit Card #

This field is used to enter the credit card number of the card you are using to put money on your child's account.

Nickname for Card

The credit card number will not be displayed anywhere on the PFI website. The nickname will be used to identify your credit card when making payments.

Expiration Date

This field is used to enter the expiration date of the credit card being used to make payments on your child's account.

Email

This field contains the email address for the user creating the account.

User Name for Login

This field contains the username to be used when logging into the PFI website to make payments or view student information.

Password

This field contains the password to be used when logging into the PFI website to make payments or view student information.

Confirm Password

This field is to confirm the password that you typed in the previous field.

Previous

Click this button to go to the previous screen.

Create Account

Click this button to create the account.

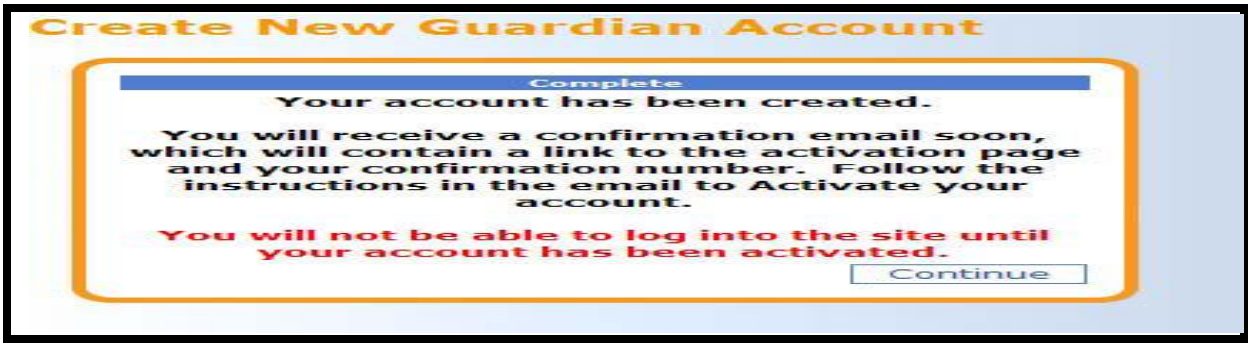
To Create a New Guardian Account

I. Click on "Sign up for an Account" from the PFI Website.
II. Select the State for which your child attends school.
III. Select the District for which your child attends school.

Please Note

If your child's district does not appear in the drop down box, please do not sign up for an account at this time. If the district is not listed here then they may not be using PFI yet.

IV. Enter the first and last name of the user creating the account.
V. Enter the address, city, state, zip, and phone number of the user creating the account.
VI. Click "Next."
VII. Select the type of Credit Card being used from the drop down menu.
VIII. Type in the Credit Card Number with no dashes.
IX. Enter a nickname for the credit card. Once the card number has been entered, it will not be used anywhere on the site. The nickname will be used instead.
X. Enter the expiration date of the credit card.
XI. Click "Next."
XII. Enter a valid email address.
XIII. Enter a username to be used when logging into PFI and posting payments.
XIV. Enter a password to be used.
XV. Confirm the password you entered in the previous box.
XVI. Click "Create Account."
XVII. You will then be directed to check your email to activate your account by entering a confirmation code.

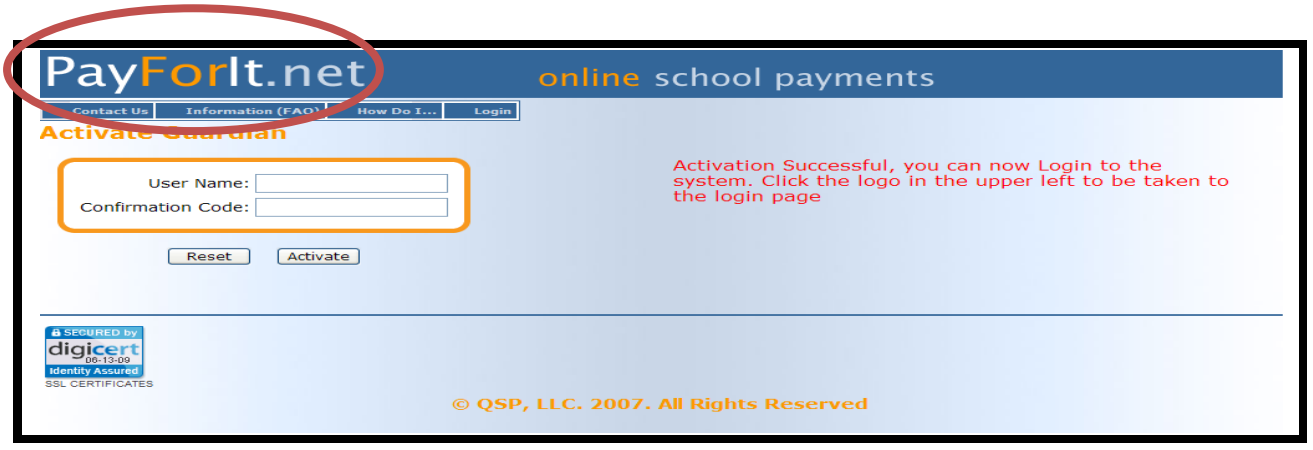

Create New Guardian Account
Complete
Your account has been created.
You will receive a confirmation email soon, which will contain a link to the activation page and your confirmation number. Follow the instructions in the email to Activate your account.
You will not be able to log into the site until your account has been activated.
Continue

XVIII. Click "Continue."

XIX. Check your email to get the confirmation code to enter on the screen above. The email will look similar to the screen below.

Sarah Martin,
Thank you for signing up with P4Test.com
Before you can access the site, you must first Activate your account. Please visit the following link Activate Account to activate
your account.
Your Confirmation Code is: 7L7HCCX
User Name: smarshall
Email Address: sarah.martin76@yahoo.com
NOTE - The best way to enter your confirmation code is to Cut & Paste it into the Confirm Code field
After you have activated your account, please follow these steps to register your students and process your first payment
1. Login to the site using your username and the password you created during the sign up process
2. Select Add Student from the Add/View Student Menu
3. Enter each student's **School, Student ID, First Name, Last Name and Grade**, then click the Register Student button
4. After you have added all of your students, you can then go to the Lunch Payments screen to process a payment
*** If you are missing any of the student information listed in #3, please contact your school ***

XX. Once you have entered the confirmation code, you will get a final confirmation page similar to the one below letting you know that the registration process is complete. You can now begin using PayForIt.Net by clicking on the PayForIt.Net logo in the upper left corner of the screen.

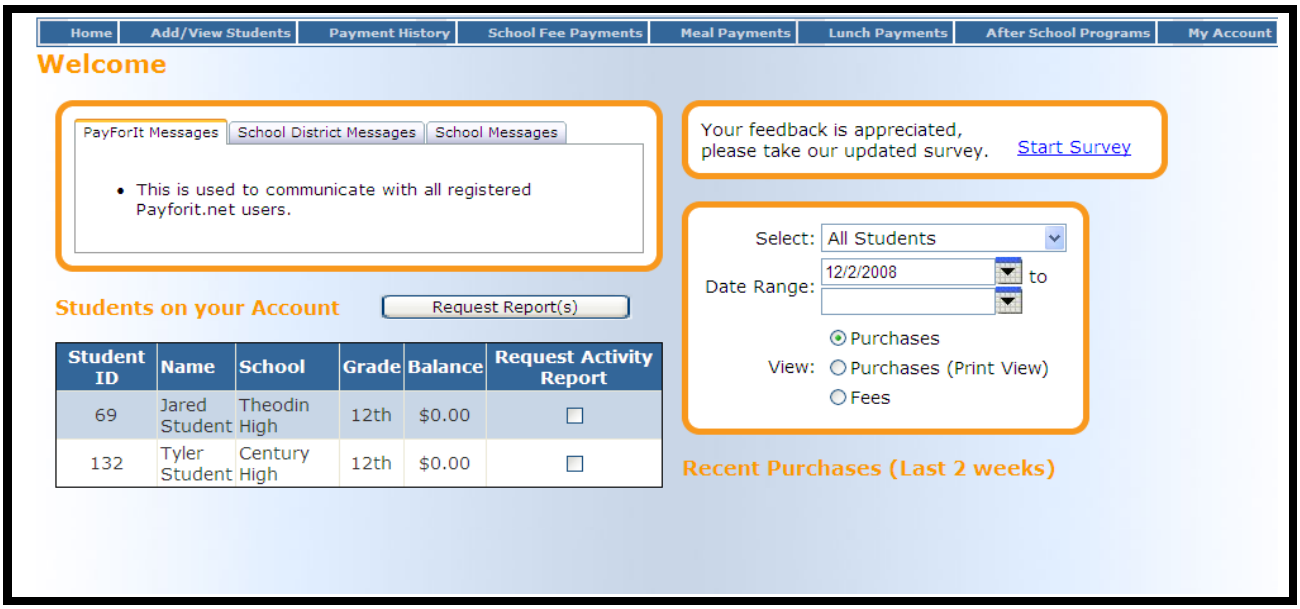


Chapter 3: Home

This option will take you to the home screen of PayForIt.Net. The home screen will display messages from PayForIt, School District, and Individual Schools. It will also show all student accounts that are registered on your account as well as the last 14 days of purchases and/or school fees from each of the students that are registered on your account.

Log in to PayForIt.Net
Click "Home."

A screen similar to the following will appear:



To View Purchases or Fees Due for the last 14 Days

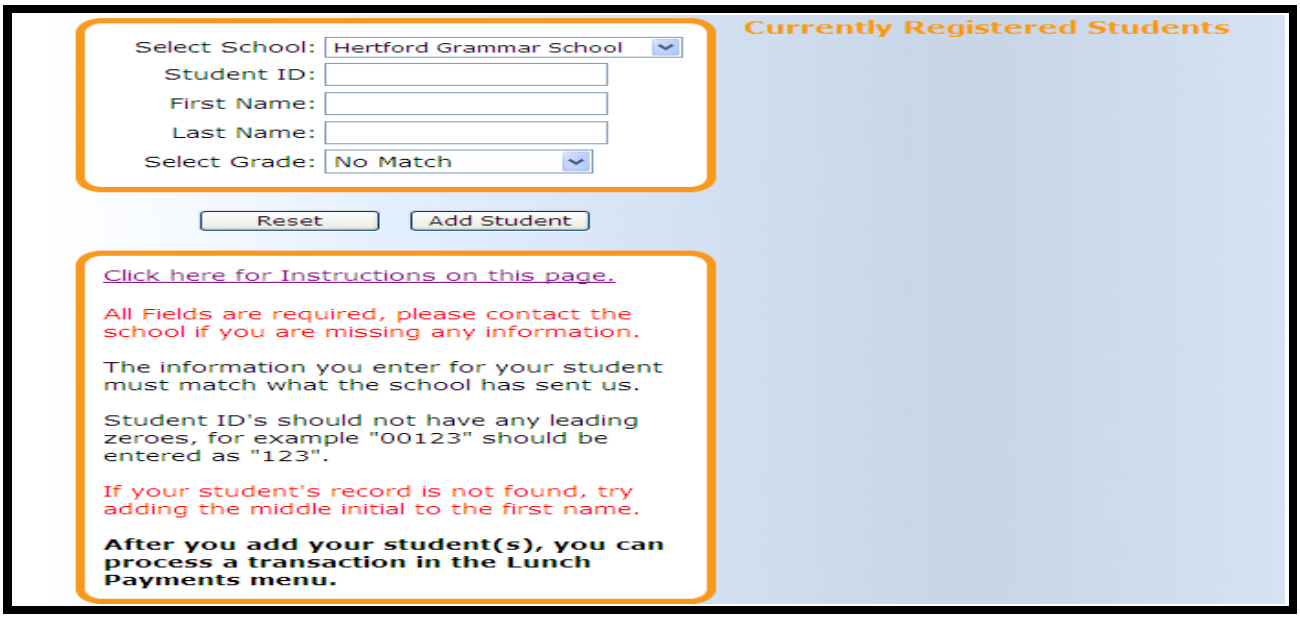
I. Select "All Students" or an individual student from the "Select" drop down.
II. Select the date range for which you wish to see transactions.
III. Select "Purchases or Fees" to view. You can also select "Purchases Print View" to make printing easier.
IV. A list of the last 14 transactions will appear below the box.

Chapter 4: Add/View Students

Use this option to set up all your children on your account so that you can view transactions and place money on their account.

Select "Add/View Students" from the home screen.
Select "Add Student."

A screen similar to the one below will appear:


Select School: Hertford Grammar School
Student ID:
First Name:
Last Name:
Select Grade: No Match
Reset
Add Student
Click here for Instructions on this page.
All Fields are required, please contact the school if you are missing any information.
The information you enter for your student must match what the school has sent us.
Student ID's should not have any leading zeroes, for example "00123" should be entered as "123".
If your student's record is not found, try adding the middle initial to the first name.
After you add your student(s), you can process a transaction in the Lunch Payments menu.
Currently Registered Students

Select School

This field will contain a list of all schools assigned to the district chosen when your profile was created.

Student ID

This field is used to enter the Student ID for the student.

First Name/Last Name

These fields are used to enter the first and last name of the student.

Select Grade

This field will contain a list of all grades associated with the selected school.

Reset

This button is used to reset the fields above so you can start over from scratch.

Add Student

This button is used to add the student to your account once all required information has been entered.

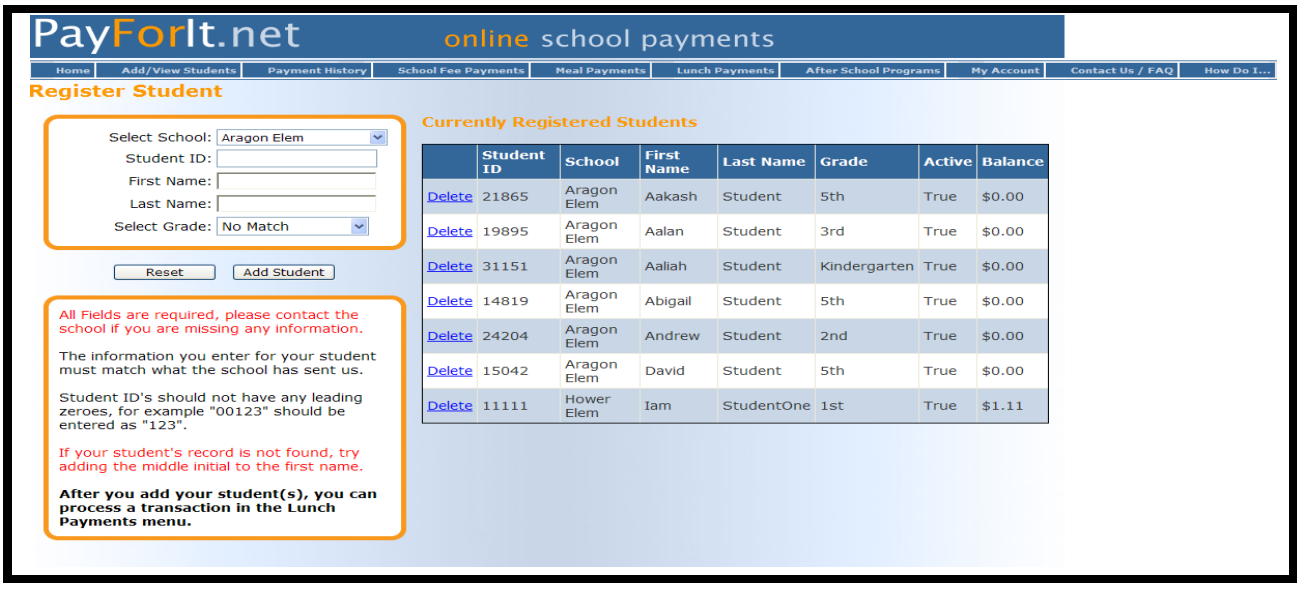
Click Here for Instructions

This link will take you to a list of step by step instructions with screen shots on how to add a student to your account.

How to Add Students to Account

I. Click "Add/View Students."
II. Click "Add Student."
III. Select the school that the student is attending from the drop down box.
IV. Type in the student's ID. This must be the same ID that the school uses. If you do not know this number, you can contact the school.
V. Type in the first and last name of the student. This must be the same name used when they registered for school.
VI. Select the grade of the student and click "Add Student."

The student that you just registered should now appear in your list of currently registered students. A screen similar to the one below will appear that will show you the student id, school, first and last name, grade, active status, and their current account balance.


PayForIt.net
online school payments
Home
Add/View Students
Payment History
School Fee Payments
Meal Payments
Lunch Payments
After School Programs
My Account
Contact Us / FAQ
How Do I...
Register Student
Select School: Aragon Elem
Student ID:
First Name:
Last Name:
Select Grade: No Match
Reset
Add Student
All Fields are required, please contact the school if you are missing any information.
The information you enter for your student must match what the school has sent us.
Student ID's should not have any leading zeroes, for example "00123" should be entered as "123".
If your student's record is not found, try adding the middle initial to the first name.
After you add your student(s), you can process a transaction in the Lunch Payments menu.
Currently Registered Students
Delete 21865 Aragon Elem Aakash Student 5th True $0.00
Delete 19895 Aragon Elem Aalan Student 3rd True $0.00
Delete 31151 Aragon Elem Aaliah Student Kindergarten True $0.00
Delete 14819 Aragon Elem Abigail Student 5th True $0.00
Delete 24204 Aragon Elem Andrew Student 2nd True $0.00
Delete 15042 Aragon Elem David Student 5th True $0.00
Delete 11111 Hower Elem Iam StudentOne 1st True $1.11

PLEASE NOTE

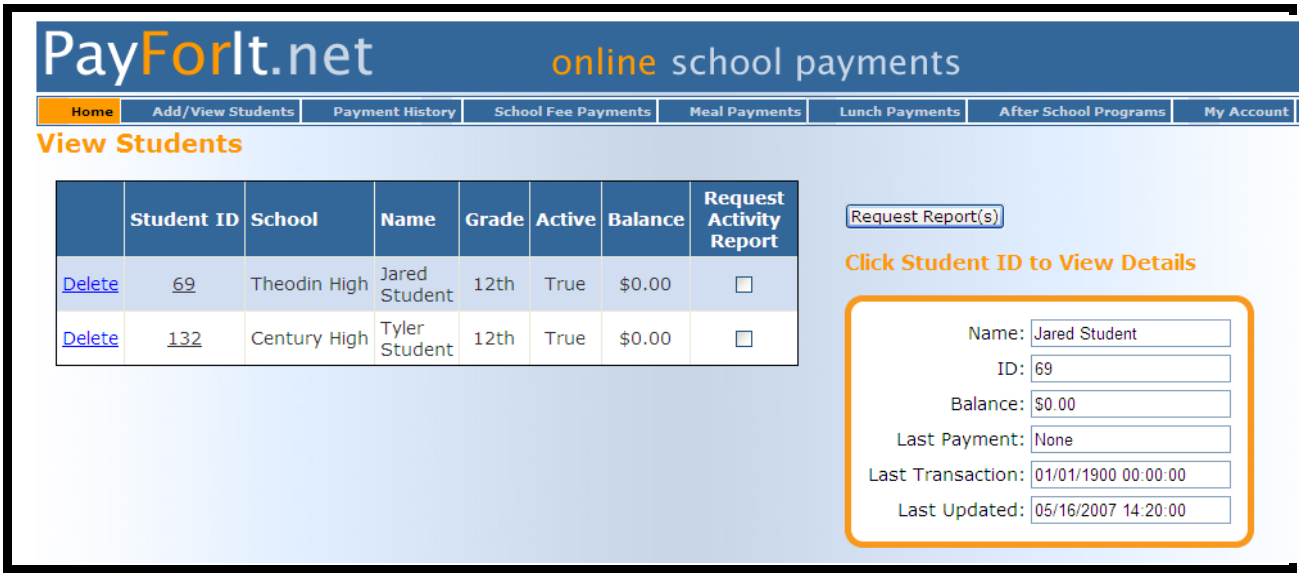
To delete a student from your account, press the "delete" link to the left of the student ID.

View Students

This option allows the user to view information on all students that have been added to their account. It shows them the Student Name, ID, Grade, School, Active Status, Account balance, date of last payment, last transaction, and the date the account was last updated. A parent or guardian can also request to have a Patron Activity Report that shows the last 30 days Meal Transactions sent to them via email.

Click "Add/Edit Students."
Click "View Students."

A screen similar to the following will appear:



Delete

This link allows the parent to remove a student from their account. Once a student is removed, a parent can no longer view their information or add money to their account unless the re-register them.

Student ID

The Student's ID number that has been assigned at the school will appear here.

School

The name of the school the student attends will appear here.

Grade

The student's current grade will appear here.

Active

The student's active status will appear here. True means active, false means inactive.

Balance

The student's account balance will appear here.

Request Activity Report

Check this box if you would like to receive a Patron Activity Report from the cafeteria for the last 30 days. This report will show what the student has been purchasing. Once you check the box beside the student you will need to press the request report button.

Last Payment

This field will display the date of the last payment made on the selected student's account.

Last Transaction

This field will display the date of the last transaction made on the student's account.

Last Updated

This field will display the date that the student record in PayForIt was last updated. In other words, it will show the date that the student's grade or school changed.

To View a Student's Account Information

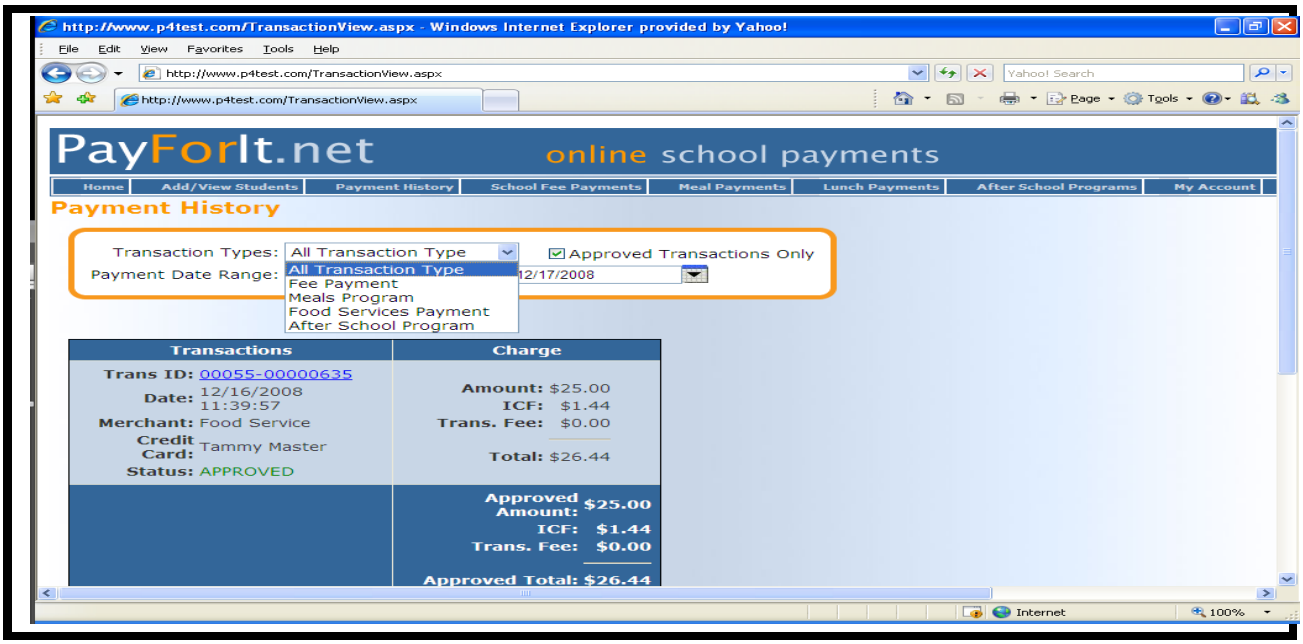
I. Click "Add/Edit Students."
II. Click "View Students."
III. Click on the Student ID to see detailed information to the right.
IV. Check the box under "Request Activity Report" to have a report emailed to you.
V. Click on the "Request Reports" button to actually have the email sent.

Chapter 5: Payment History

Use this option to see a list of all transactions within a specified date range. This screen will show the credit card used, transaction number, the status of the transaction (approved or denied), the amount of the transaction, the internet convenience fee, and the total amount of the transaction.

Select "Payment History" from the home screen in PFI.
Select "Payment History."

A screen similar to the following will appear:



Transaction Types

This drop down menu will show a list of all transactions that are available to view. Select which type to view: Fee Payment, Meals Program, Food Services Payment or After School Program.

Fee Payment: This option is for school fees. For example: Text books, sports teams, school field trips, ect…

Meals Program: This option is for those districts that set up specific menus and parents can go online and order a specific meal for their students and pay for those meals on specific days.

Food Service Payment: This option allows a parent to go online to put money on their child's account.

After School Program: This option is used for those students who participate in the After School Program.

Approved Transactions Only

If this option is checked, the search will only show approved transactions in the selected date range. If this box is not checked, the search will show approved as well as denied transactions.

Payment Date Range

Enter the beginning and ending dates for the range you wish to view transactions.

Transactions

This box will show the transaction id, date of transaction, merchant account, credit card used and the status of the transaction.

Charge

This box shows the amount of the transaction, internet convenience fee, transaction fee and the total amount of the transaction. It will also show a grand total for all transactions listed.

Chapter 6: School Fee Payments

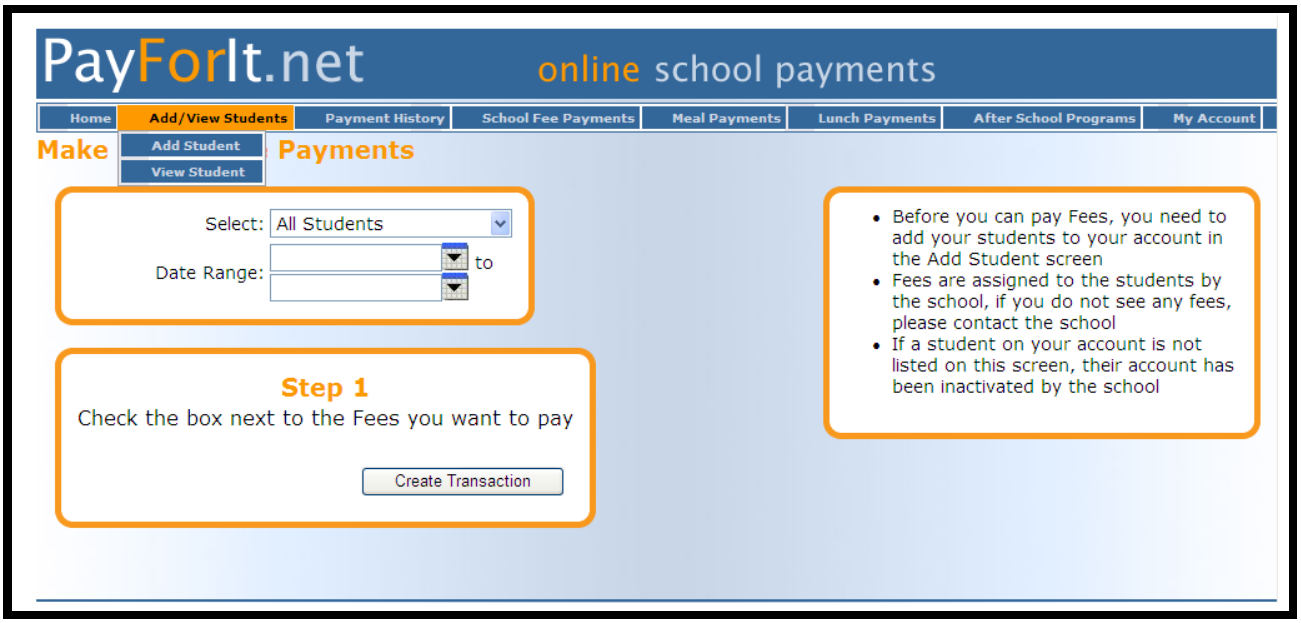
Some schools have signed up to use PFI to allow parents to pay for school fees online. School fees can include text book fees, locker fees, yearbook fees, school field trip fees, ect… This option will allow the user to pay school fees, schedule fee payments, and view scheduled payments.

Make Fee Payment

Use this option to choose which fees to pay and actually make a payment.

Select "School Fee Payments."
Select "Make Payment."

A screen similar to the following will appear:


PayForIt.net
online school payments
Home
Add/View Students
Payment History
School Fee Payments
Meal Payments
Lunch Payments
After School Programs
My Account
Make
Add Student
View Student
Payments
Select: All Students
Date Range: to
Step 1
Check the box next to the Fees you want to pay
Create Transaction
Before you can pay Fees, you need to add your students to your account in the Add Student screen
Fees are assigned to the students by the school, if you do not see any fees, please contact the school
If a student on your account is not listed on this screen, their account has been inactivated by the school

How to Make a Payment

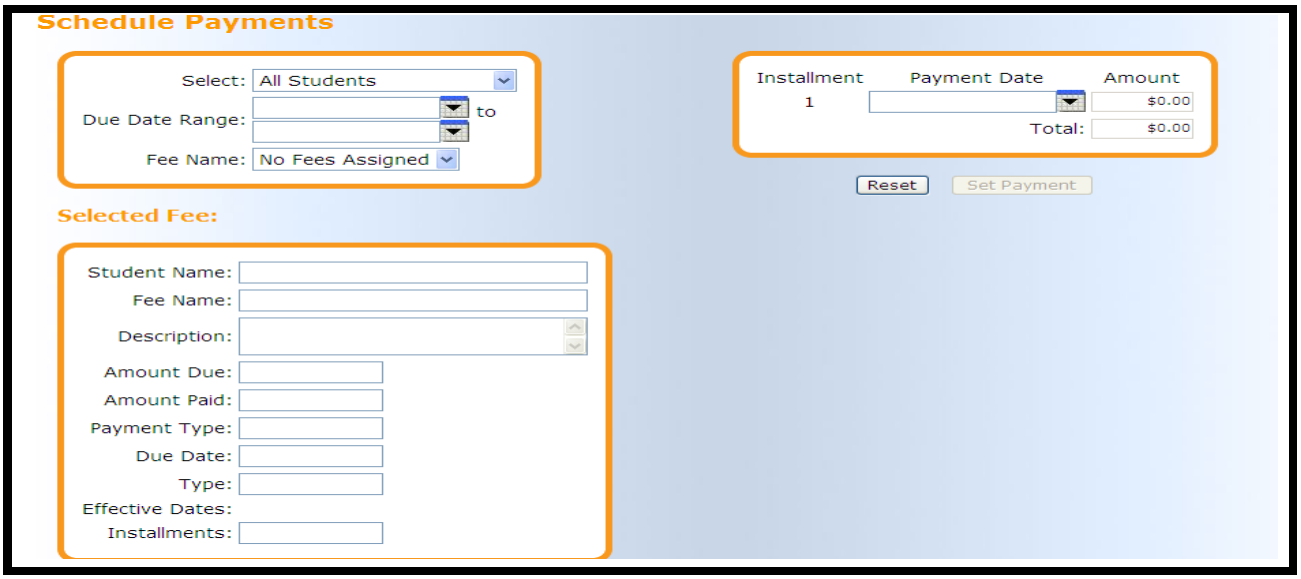
I. Select "All Students" or an individual student from drop down box.
II. Select date range for which to view school fees.
III. A list of all fees related to the selected student will appear in the box under "Step 1."
IV. Check the box beside all fees you wish to pay.
V. Click "Create Transaction" to submit the payment.

Schedule Payments

Use this option to schedule fees to be paid on a certain date. You can set up all fees ahead of time to be paid on a specific date which would help eliminate forgetting to pay for something in the future.

Select "School Fee Payments."
Select "Schedule Fee Payments."

A screen similar to the following will appear:



Chapter 7: Meal Payments

Chapter 8: Lunch Payments

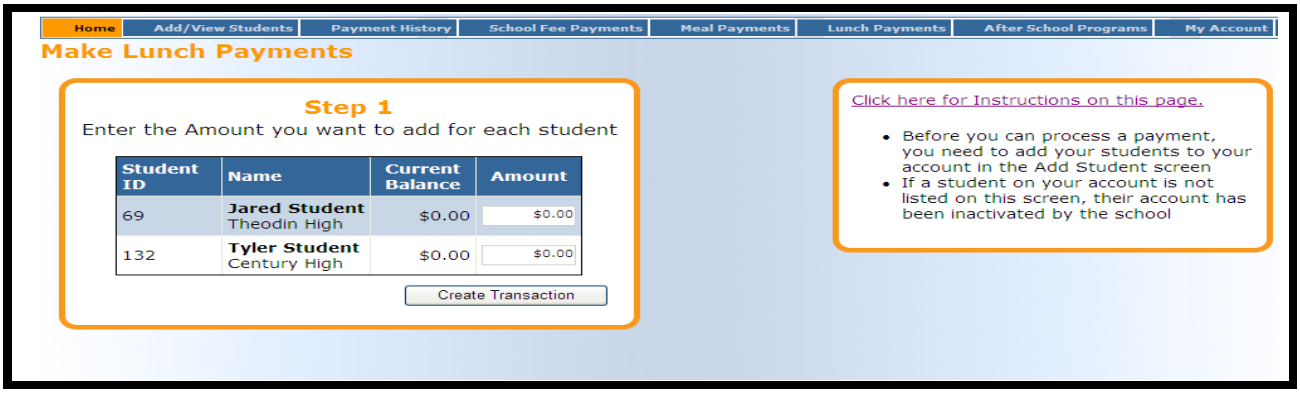
This menu option gives the user the ability to make deposits on their child's account. There are two different ways that a user can choose to deposit money: Make a one-time payment or set up recurring payments.

Make Lunch Payment

This option is used to make deposits on an account at any time the user would like.

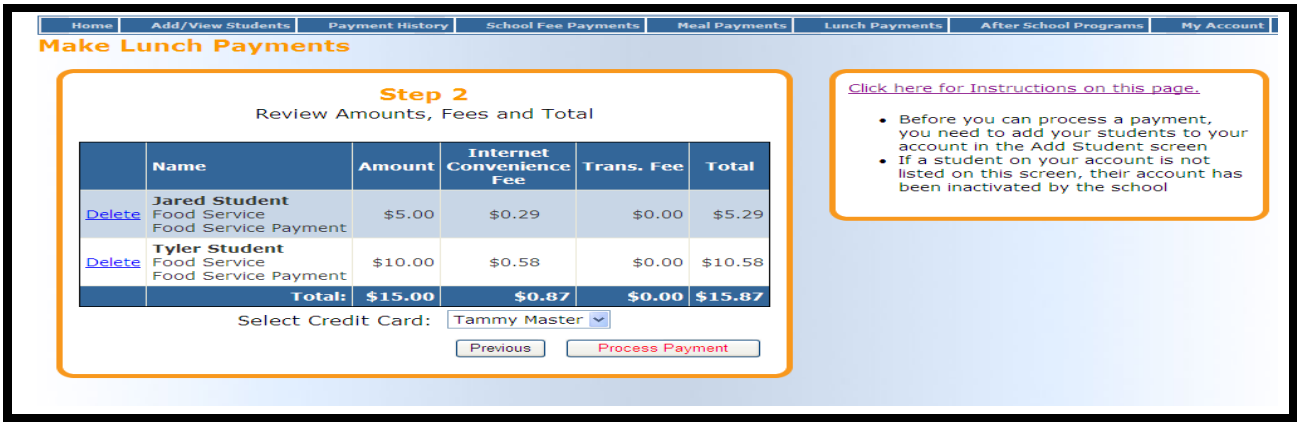
Select "Lunch Payments" from the home screen.
Select "Make Lunch Payment."

A screen similar to the following will appear:



How to Deposit Money on an Account

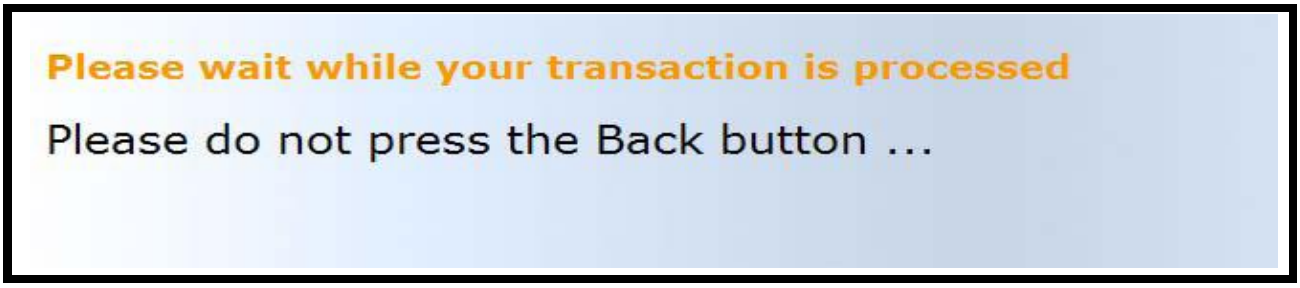
I. Click "Lunch Payments."
II. Click "Make Lunch Payments."
III. A list of all students on your account will appear. Type in amount of money for each account.
IV. Click "Create Transaction" and see a screen similar to the following:



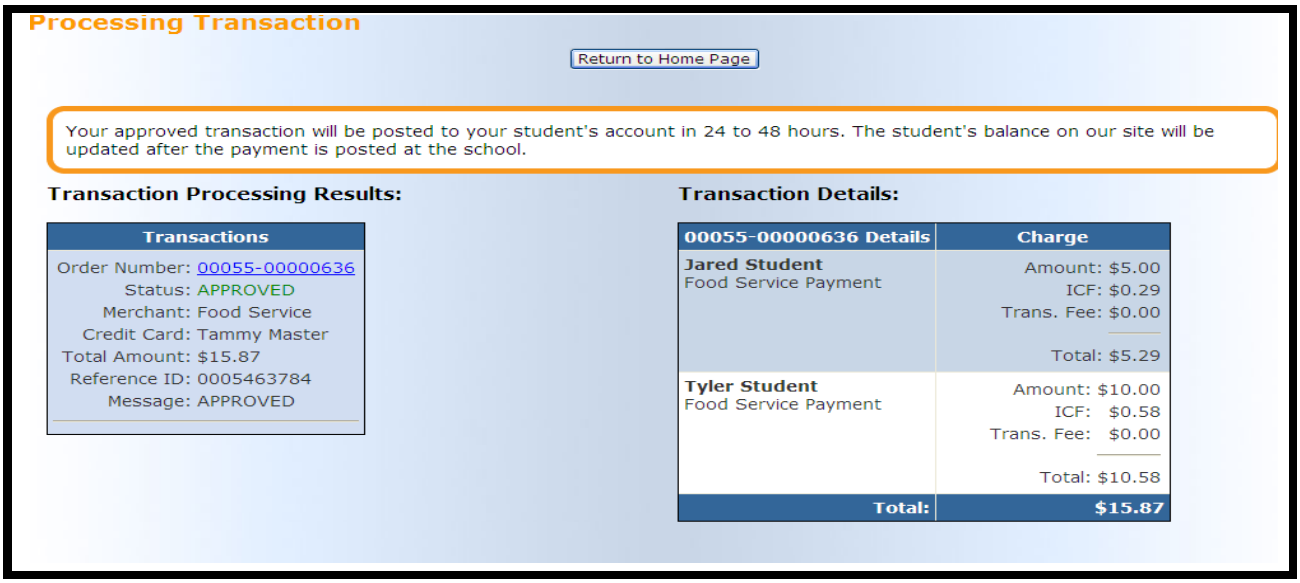
V. Review the transaction and make sure everything is correct.

VI. Select appropriate credit card.

VII. Once everything is correct, click "Process Payment." You will see a screen similar to the following:



VIII. Once the transaction has completed, you will get a confirmation screen similar to the following:



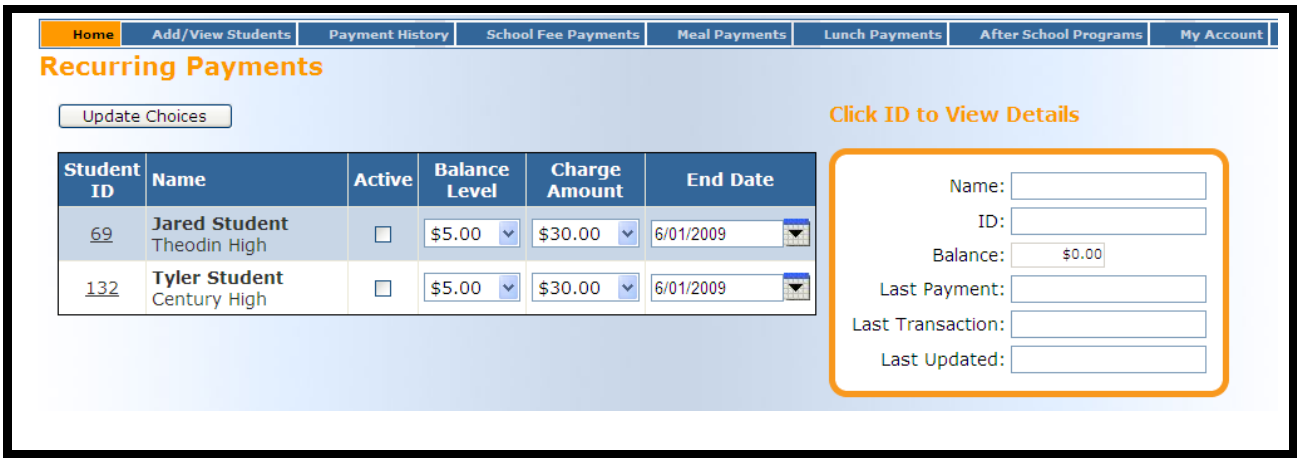
IX. The user will also receive an email with confirmation of the payment and the total amount that will be charged to the credit card.

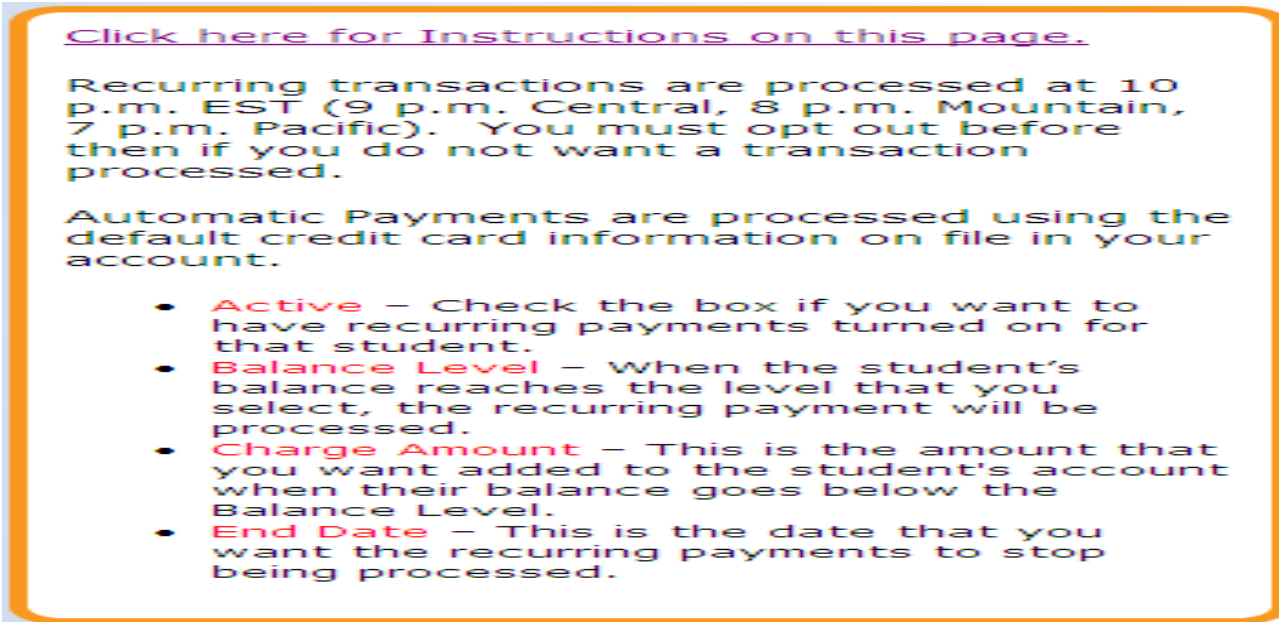
Recurring Payments

This option allows the user to set up recurring payments that are automatically processed and billed when certain predetermined conditions are met. This feature eliminates the need to worry about your child's account balance getting to low to pay for meals.

Select "Lunch Payments."
Select "Recurring Payments."

A screen similar to the next will appear:




Click here for Instructions on this page.
Recurring transactions are processed at 10 p.m. EST (9 p.m. Central, 8 p.m. Mountain, 7 p.m. Pacific). You must opt out before then if you do not want a transaction processed.
Automatic Payments are processed using the default credit card information on file in your account.
Active – Check the box if you want to have recurring payments turned on for that student.
Balance Level – When the student's balance reaches the level that you select, the recurring payment will be processed.
Charge Amount – This is the amount that you want added to the student's account when their balance goes below the Balance Level.
End Date – This is the date that you want the recurring payments to stop being processed.

Student ID

This field will display the student's ID number. Click on the ID to see more details about last transactions and payments over to the right.

Name

This field displays the student's name as well as the school the student attends.

Active

This field is used to turn recurring payments on and off. If the box is checked, the recurring payments will be turned on. If the box is unchecked, they will be turned off.

Balance Level

This field is used to determine what level you wish to have the recurring payment take place. For example, if you would like the payment to be posted once the child's account reaches $5.00, then set this field to $5.00.

Charge Amount

This field is used to determine how much money will be added to your child's account once the balance level has been reached.

End Date

This field contains the date for which you wish the recurring payment to no longer be processed.

How to Enter a Recurring Payment

I. Click "Lunch Payments."
II. Click "Recurring Payments."
III. Check the "Active" box beside all students for which you wish to set up recurring payments.
IV. Select the desired balance level.
V. Select the Charge Amount.
VI. Enter an end date for which you wish the recurring payments to stop.
VII. Click "Update Choices" to submit the information.

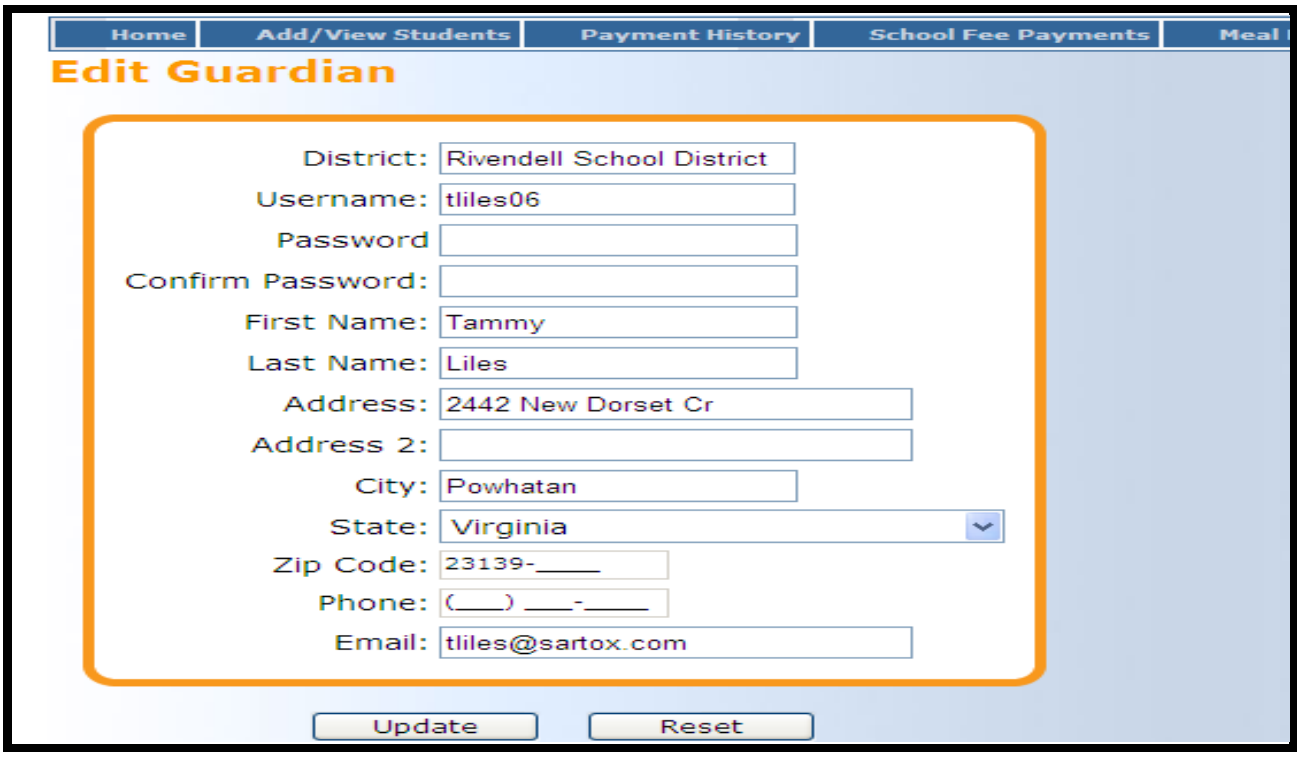
Chapter 9: After School Programs

Chapter 10: My Account

This option allows the user to edit their account information, credit card information, as well as email options.

Select "My Accounts" from the main menu.
Select "My Account" from the sub-menu.

A screen similar to the following will appear:



Edit Guardian

The user can edit all information on this screen with the exception of the District and the Username. Once the user edits information on this screen, he/she needs to click the "update" button to save the changes.

Manage Credit Card

PayForIt.Net gives the user the ability to store multiple credit card numbers on their account. By storing multiple credit cards, the user will also have the option to choose which credit card to use when making transactions. This option gives the user the ability to add more credit cards. This option will also allow you to edit information on an existing credit card.

Click "My Account."
Click "My Credit Cards."

A screen similar to the following will appear:

To Add a New Credit Card

I. Select "Add New Card" from drop down box.
II. Enter a nickname for the credit card.
III. Enter the credit card number.
IV. Enter the month the credit card expires.
V. Enter the year the card expires.
VI. Select the credit card type (master or visa.)
VII. If you would like to make the credit card your default credit card when making deposits on accounts, check the box beside "default."
VIII. Click "Add."

To Edit an Existing Credit Card

I. Select credit card to edit from the drop down box.
II. Make any desired changes.
III. Click "update" to submit any changes.

Please Note

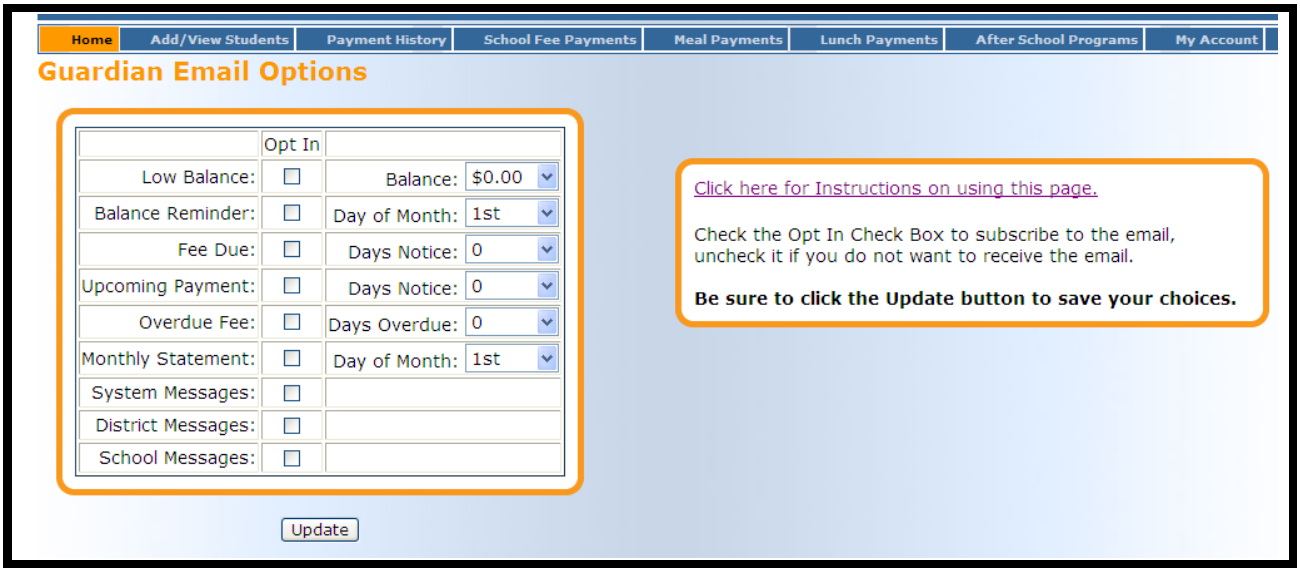
To get additional instructions on how to add/edit credit cards, click on the link that says "Click Here for Instructions on this Page."

My Email Options

PayForIt.Net gives the user the ability to set up a variety of email options that are unique to their account. The user has the flexibility to opt in or opt out to any of these options and make changes to these options at any time. The emails will automatically be sent to the email address that is associated with the user account.

Select "My Account."
Select "My Email Options."

A screen similar to the following will appear:



Explanation of Choices

Low Balance

PayForIt.Net will automatically send an email when your child's account balance reaches a predetermined balance that you specify so you know to add money to the account. You can specify the amount using the drop down box to the right of "Low Balance."

Balance Reminder

PayForIt.net will automatically send an email on a predetermined day of the month alerting you as to your child's account balance. You can determine which day of the month you want the reminder sent by using the drop down box beside "day of month."

Fee Due

If your school is using PayForIt.Net to process school fees, then you can opt in to this email alert. PayForIt.Net will automatically send an email reminding you that your child's school fee is due so that you can remember to make the payment in a timely fashion. You can set how far in advance you will get the notification that the payment is due using the drop down box beside "days notice."

Upcoming Payment

This can only be used if your school district is using PayForIt.Net to process school fees. PayForIt.net will automatically send an email reminding you that there is an upcoming fee payment that has been scheduled. You can determine how many days in advance you will be notified of the upcoming payment using the drop down box beside "days notice."

Overdue Fee

PayForIt.Net will automatically send an email if one of your fees is not paid by the due date. Yu can set PayForIt.net so a notification email is sent "x" number of days after the payment is overdue using the drop down box beside "days overdue."

Monthly Statement

PayForIt.Net will automatically send you an email one day a month showing all the PayForIt.Net transactions for the month. You can determine which day of the month this is emailed to you by using the drop down box beside "Day of the Month."

Messages

If the school, district, or PayForIt.Net posts special messages, you can opt to receive these messages via email as they are posted. If you do not opt to receive an email, you will still be able to see these when you log into the website.

To Edit Email Options

I. Click "My Account."
II. Click "My Email Options."
III. Place a check in the "opt in" box beside each option for which you wish to receive an email.
IV. Set parameters to the right of "opt in" as described above. If you want to make changes so that you do not receive an email, uncheck the "opt in" box.
V. Click "Update" to submit any changes.

Chapter 11: Contact Us/FAQ

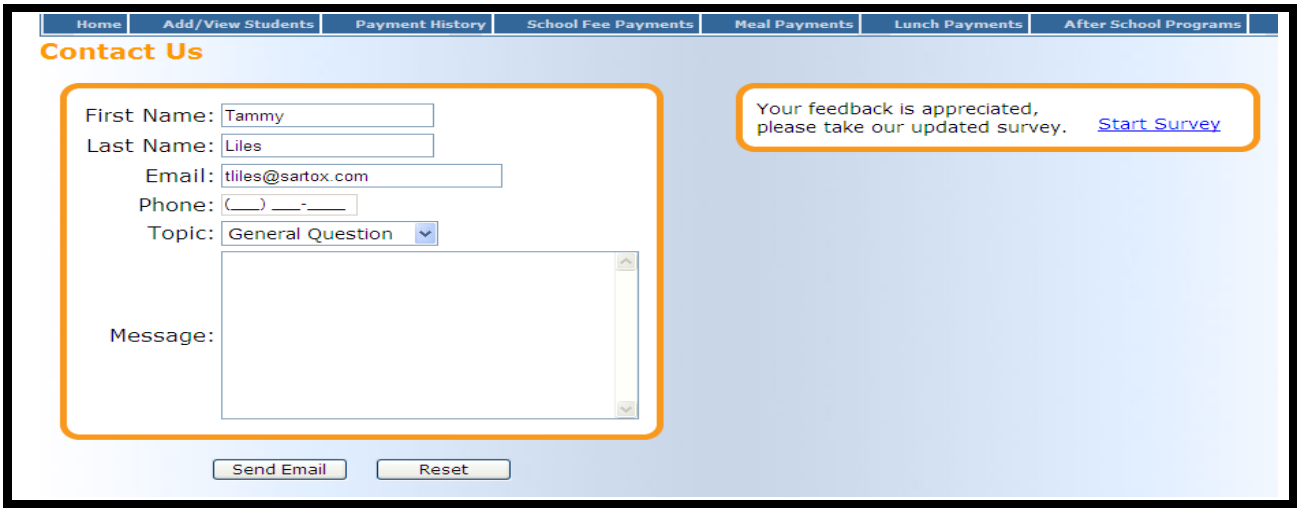
This menu option gives the user the ability to email questions to PayForIt.Net and/or look up answers to Frequently Asked Questions.

Contact Us

This option gives the user the ability to email any questions they may have about the site or transactions to PayForIt.Net.

Select "Contact Us/FAQ."
Select "Contact Us."

A screen similar to the following will appear:



To Send Email

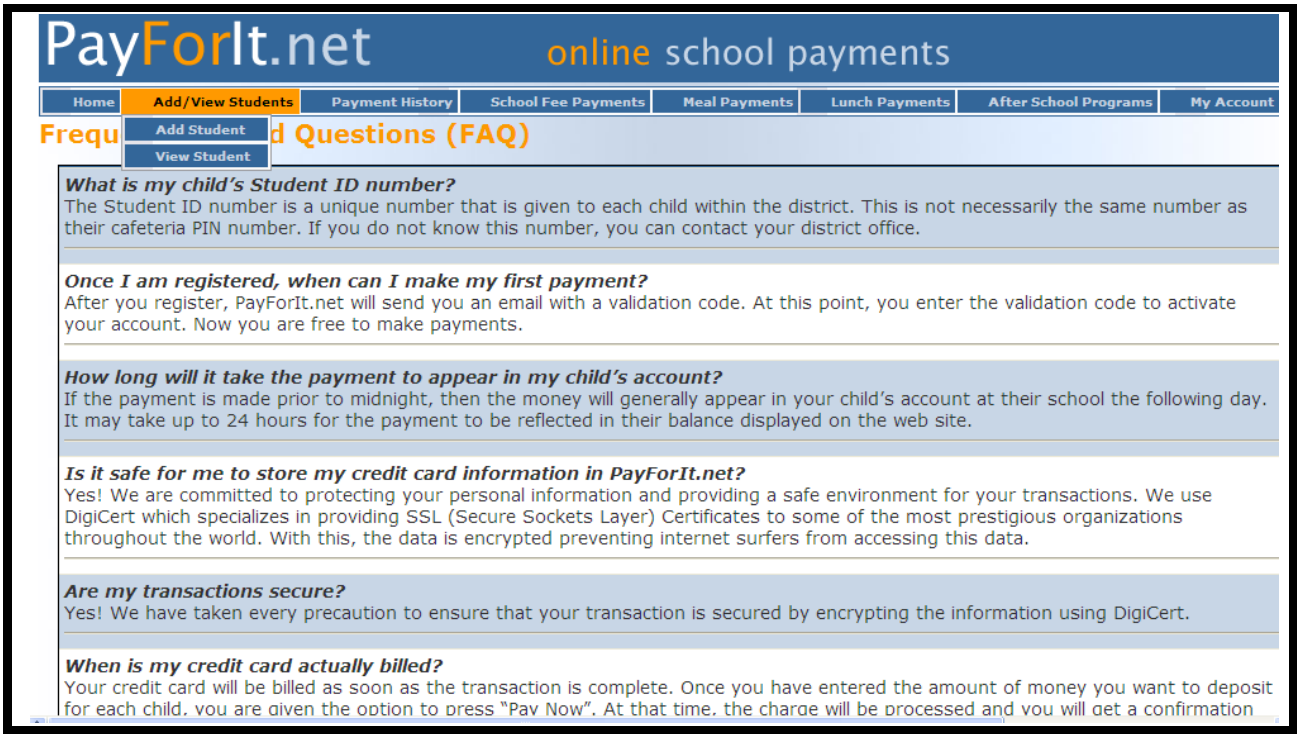
I. Select topic that question is in reference to from the drop down box.
II. Enter question in the "message" box.
III. Click "Send Email."
IV. Wait for response.

Frequently Asked Questions

This option gives the user the ability to look up popular questions from users and getting an answer before emailing PayForIt.Net. This option allows the user to get a quicker response to any questions they may have. Therefore it is always a good idea to check for answers to your questions here before sending an email or calling for support.

Click "Contact Us/FAQ".
Click "FAQ."

A screen similar to the following will appear:


PayForIt.net
online school payments
Home
Add/View Students
Payment History
School Fee Payments
Meal Payments
Lunch Payments
After School Programs
My Account
Add Student
View Student
Frequ d Questions (FAQ)
What is my child's Student ID number?
The Student ID number is a unique number that is given to each child within the district. This is not necessarily the same number as their cafeteria PIN number. If you do not know this number, you can contact your district office.
Once I am registered, when can I make my first payment?
After you register, PayForIt.net will send you an email with a validation code. At this point, you enter the validation code to activate your account. Now you are free to make payments.
How long will it take the payment to appear in my child's account?
If the payment is made prior to midnight, then the money will generally appear in your child's account at their school the following day. It may take up to 24 hours for the payment to be reflected in their balance displayed on the web site.
Is it safe for me to store my credit card information in PayForIt.net?
Yes! We are committed to protecting your personal information and providing a safe environment for your transactions. We use DigiCert which specializes in providing SSL (Secure Sockets Layer) Certificates to some of the most prestigious organizations throughout the world. With this, the data is encrypted preventing internet surfers from accessing this data.
Are my transactions secure?
Yes! We have taken every precaution to ensure that your transaction is secured by encrypting the information using DigiCert.
When is my credit card actually billed?
Your credit card will be billed as soon as the transaction is complete. Once you have entered the amount of money you want to deposit for each child, you are given the option to press "Pay Now". At that time, the charge will be processed and you will get a confirmation

Look through all questions to find answers to your questions. If your question is not listed or answered here, then use the "contact us" feature to send an email.

Chapter 12: How Do I

This option allows the user to easily access instructions on how to do certain things in PFI.Net. The menu option includes shortcuts to instructions for the following:

- Set Email Options
- Set up Recurring Payments
- Request and Read Patron Activity Reports.
- Add/Edit Credit Card Information
- Add Student to Account
- Make Lunch Payments
- Download Adobe Acrobat Reader

Select an option to bring up instructions on the screen.